King County Department of Natural Resources
Solid Waste Division Commision for Marketing Recyclable Materials

Landscaper Focus Group Findings

Current Practices & Attitudes about Compost Use in King County

December 2000

Prepared for King County Department of Natural Resources
by Cascadia Consulting Group
as part of the Organic Materials Management Feasibility Study

This report presents information as reported by the Cascadia Consulting Group, based on the discussions from two focus groups with representatives from the Landscaping industry. Information and statements found herein should not be misconstrued as an official position of King County.

For a copy of this report or for more information, please contact:

Dan White King County Commission for Marketing Recyclable Materials
(206) 296-4430
Josh Marx King County Solid Waste Division
(206) 296-4429
King Street Center
201 S. Jackson Street, Suite 701
Seattle, WA 98104
TTY Relay: 1-800-833-6388

This report is available in alternate formats upon request.

This report was printed on recycled paper with 20 percent post-consumer content.

Table of Contents

Introduction & Background

Purpose

In 1999, the King County Department of Natural Resources commissioned a comprehensive study of current use and potential markets for organic-based products in the county. As part of the study, Cascadia Consulting Group conducted focus groups with professional landscapers to explore current landscaping practices and attitudes regarding the use of compost and other organic-based products. The focus groups were intended to complement a previous telephone survey by providing more information on current compost demand in this key market segment as well as barriers to and potential ways to increase the use of organic materials in landscaping.

Methodology & Composition

Cascadia Consulting Group conducted two focus groups with 21 professional landscapers on the evenings of June 27 and 28, 2000. Many landscapers included in the discussions were company owners or managers, and all participants were decision-makers regarding the purchase and use of landscaping materials and practices. Participants were recruited to focus on landscapers that conduct most of their business within King County but outside Seattle's city limits. Landscapers were recruited to reflect a mix of the following characteristics:

- **Work types** – In the telephone screening interviews, 17 participants said they perform maintenance of existing landscaping, and 17 conduct installation of new landscaping; most participants work on residential landscapes, but some had experience with public-sector projects and commercial sites;[1]
- **Company sizes and revenues** – 13 focus group participants described their landscaping companies as "small," or having less than $500,000 in annual revenue, while 8 participants represented larger companies with yearly

[1] These numbers add up to more than 21 participants because 13 landscapers said that they conduct both maintenance work as well as installation of new landscaping. Of the participants that did not report doing both types of work, four said they performed maintenance, and four said they installed new landscaping.

revenues of $0.5 million or greater – a suitable mix considering that the majority of landscaping firms in King County are small;[2]

- **Frequency and amount of compost use** – from "rarely/never" (2 landscapers) to "always/often," with most participants in the "sometimes/occasionally" (6 landscapers) or "always/often" (13 landscapers) categories of compost use.[3]

The numbers listed above reflect actual participation in the focus groups. The composition of the group of screened participants was slightly different, but five of the recruited landscapers did not show up for the focus group sessions. We did not screen participants based on other criteria, such as age, ethnicity, or education, since these factors are less relevant to the study. A screening interview for recruitment of participants is included as Appendix C; the strike-outs on the matrix indicate no-shows.

Since June is the peak work season for landscapers, recruiting participants for the focus groups was challenging. We called approximately 400 phone numbers of landscapers to recruit 25 participants, 20 of whom attended and participated in one of the two sessions. (One participant unexpectedly brought her business partner, bringing the total participation to 21 landscapers.) Though we contacted a broad cross-section of the local landscaping industry, we believe that the landscapers that agreed to participate in the focus groups represented a more specialized subset of the industry, as noted in the following "Limitations" section.

The focus group discussions took place between 7:00 and 9:00 p.m. at the Bellevue Botanical Garden, located near downtown Bellevue. This informal venue was intended to provide a comfortable atmosphere for a candid, free-flowing, productive discussion.

Cascadia staff used the attached discussion guide, Appendix A, as a general framework for the focus group sessions. A professional videographer recorded both sessions. We also used matrices and flipcharts to help outline, discuss, and summarize certain topics.

---

[2] The 8 participants from larger companies categorized their businesses as follows: 3 "medium" firms ($500,000 to $1 million in annual revenue); 3 "large" firms ($1 million to $2.5 million); and 2 "very large" (more than $2.5 million in annual revenue).

[3] In planning the recruitment of participants, it was determined that the discussions should focus on compost users and that the screening would include no more than two landscapers in the "rarely/never" category of compost use. It was difficult to recruit participants in their busy season and participation was self-selecting for those landscapers with an interest in compost. Accordingly, in the screening interviews, the majority of focus group participants reported using compost "often" or more frequently.

Limitations

Focus groups are a useful tool for eliciting and exploring information, reactions, and suggestions from a targeted audience. While the focus group format allows for the expression of more details and subtleties than a formal survey, the results are neither statistically significant nor representative of the full range of opinions and practices of the landscaper community as a whole.

In this report, the term “landscapers” refers to the participants in the focus groups, unless otherwise specified. The findings should not be projected to represent the opinions or behaviors of all landscapers in the region. Moreover, participation in the focus groups is self-selecting, since landscapers that are more interested in compost use are more likely to participate. Additionally, those landscapers with less involvement in compost use screened themselves by expressing lack of interest and quickly curtailing recruitment attempts.

As a result, the landscapers that participated in the focus groups are likely more supportive of and involved in compost use than the industry as a whole. In fact, many of the participants were strong advocates of compost use. Based on the discussion, most focus group participants seem to use compost more than do typical members of the landscaping industry as a whole. In addition, many focus group members conduct much of their work on high-end residential projects – that is, for wealthier homeowners that spend more money on landscaping than average.

The focus groups also sought to gain perspective on the landscaping industry as whole. Participants not only discussed their own attitudes and practices, but they also shared their perceptions of the broader landscaping industry in the region. It is important to recognize, however, that the information expressed represents the opinions of the landscapers in attendance, but it does not necessarily comprise an objective portrayal of the landscaping industry as a whole.

Summary

This report presents the key findings from the two focus groups with landscapers that Cascadia Consulting Group conducted on behalf of the King County Department of Natural Resources in late June 2000. The intent of the focus groups was to explore current professional landscaping practices and attitudes regarding the use of compost and other organic-based products in King County, including what is driving demand as well as barriers to and potential ways to increase the use of organic materials in landscaping. A summary of the major findings appears below.

Current Practices: Compost Products & Applications

The focus groups explored what landscapers think about compost, the compost products in use locally, how compost is used, and compost quality and quantity issues.

- Landscapers in the focus groups enthusiastically embrace the use of compost.
- Landscapers use compost products from many sources, including some from outside King County.
- Landscapers use compost products in a variety of applications, though compost is not often used in landscaping at typical new homes.
- Landscapers feel that compost quality needs improvement.
- Inconsistency is a problem for some compost products.
- Landscapers believe that at times an imbalance exists between short-term supply and demand for compost products.

Landscaping Materials: Use & Demand

The landscapers in the focus groups also discussed factors that affect use of and demand for compost and non-compost products, including costs, availability, and job specifications. The discussion covered installation of landscaping at typical new developments as well as landscaping retrofits, maintenance work, and new landscaping at high-end or custom homes.

- Initial costs favor the use of non-compost products. The short-term marginal costs of landscaping with compost are higher, but compost use can pay for itself over time.

- Alternatives to compost are more readily available and less expensive, but focus group participants see them as inferior.

- Job specs and short-term considerations drive decisions about landscaping materials and practices.

- New housing developments typically take a least-cost approach, where cost and availability drive the choice of landscaping products and practices. High-end or custom homes and retrofits are more likely to use compost initially.

Market Potential: Barriers & Opportunities

Focus group participants described their expectations for future compost demand and willingness to pay for better compost products. They also discussed ways to improve compost products and to foster demand for their use among landscapers and the general public.

- Landscapers expect demand for compost products to grow in the future.

- Landscapers are willing to pay more for a consistent and high-quality product.

- Education of consumers, developers, and landscapers on the benefits of compost is key to future demand.

- Sharing information and technology could improve compost products and increase their use.

- The compost industry needs competition and standards to raise quality.

- Reactions to regulatory approaches were mixed, but support exists for government involvement to encourage compost use through education and pilot projects.

- Marketing the use of compost products could be based on such concepts as:

    - The ability to keep your lawn green and save water;

    - The ability to keep your lawn green and save salmon;

    - The genuine, real, earthy nature of compost products;

    - You don't need chemicals and neither do the salmon;

    - The value of using compost and investing in the long term; and

    - Compost works – it produces healthier, more attractive landscapes with lower maintenance needs and costs.

Focus Group Findings

Current Practices: Compost Products & Applications

Following the preliminary background and introduction of participants, the focus groups began with a discussion of organic materials. Participants explained what materials they considered to be "compost products." They also discussed current use of organics, including the amounts and types of use by application and development mode – that is, maintenance of existing landscapes, new installations, or retrofits. Participants also discussed perceptions of compost quality and what drives demand for organics in the landscaping field in King County. The sessions explored whether opinions about compost, especially adverse ones, are based on word-of-mouth or personal experiences.

- **Landscapers in the focus groups enthusiastically embrace the use of compost.**

Most focus group participants are users of compost products, and even those that did not regularly use compost understood its benefits and supported its use. (The latter group generally believed that compost is desirable, but their contracts or customers did not specify its use, and they felt that using compost would raise their prices above competitive levels.)

Participants in the focus groups explained that compost is needed because many soils in the region are nutrient-poor or otherwise degraded. Good topsoil may have once been present, but they said that in the development process, the topsoil is typically scraped away and sold to a soil company. Later, a minimal amount of topsoil may be purchased back when landscaping is installed on the site. The landscapers also recognized that compost provides ongoing benefits in terms of soil structure and biota, drainage and runoff, and plant communities. Compost is also useful in restoring organic materials that are removed from yards when landscaping activities, such as collecting fallen leaves, disrupt the natural cycling of nutrients.

> *"It's not a theory anymore – it's a reality. This [compost] works."*
>
> *"It's [compost] food for your plants. It's food for microbes."*
>
> *"I think it's absolutely necessary… to regenerate the nutrients however you can…. For residential landscapes, for instance, there is not a natural type of soil in quantity available enough to meet the needs, so… we have to recycle our nutrients."*

"When you're working in gardens doing the kind of high-end maintenance where you're cleaning up all the debris and everything all the time, you're taking away nature's natural way of like giving itself… nutrients and all that kind of stuff."

"[We need to use compost] Because things are dying."

"It's the combination of all things. What actually precisely works is understanding nature – that is number one… natural science."

"You can eat all the vitamins in China, but they're not going to do you any good if you don't get the right mineral content in your body. It's the same for the plant. If you don't have the mineral content in the soil, and the organic matter as a combination, the same thing happens: it doesn't quite work."

"You asked the question earlier of why use compost, and I don't think we really answered that, other than the fact all the plants of anything that you put in the ground – if it's growing in organic, mixed soil – does three to four times better than any plants you put in straight dead soil. I mean it's a big, big difference. Even if the compost is low-grade and poor quality and miserable to work with, no matter what kind of crap we end up getting, it's still organic, and it's going to make an upgrade to the existing crappy soil that's worse by far."

- **Landscapers use compost products from many sources, including some from outside King County.**

Landscapers in the focus groups reported currently using a diverse array of compost materials from a variety of sources. While Cedar Grove, Pacific Topsoils, GroCo, and SteerCo are common sources of compost products, participants also obtain compost from other sources outside King County. The most common outside sources are located in adjoining Pierce and Snohomish counties, but some landscapers use materials from elsewhere in Washington as well as other states and provinces.

Focus group participants listed the following types and sources of compost used in the region:

- Cedar Grove – Pure compost and 50/50 mix compost/soil blend;
- Pacific Topsoils (PTS) – Various products, including EnviroMix, lawn top-dressing mix (mostly sand, with some compost), WinterMix, 3-way mix, 5-way mix, screened comp mulch, Pacific Garden Mulch, specially mixed soil blends;

- SteerCo manure compost;
- GroCo biosolids compost;
- Land Recovery, Inc. (LRI) compost and soil blends from Puyallup;
- PREP compost from Purdy in Pierce County;[4]
- Bailey Compost (yard waste and dairy manure compost) from Bailand Farms in Snohomish;
- Compost from a facility in Covington;[5]
- Snohomish Topsoils;
- Port Blakely Topsoils in Issaquah;
- Sunset Materials;
- Specialty compost from an organic fruit farm in Oregon;
- Mushroom farm compost from Western Compost in Fife;
- Compost tea and compost tea sprays;
- Composted bark;
- Forest duff, from evergreen and deciduous forests (a mulch);
- Other plant mulch and bark, including recycled arborist chips from non-diseased trees; and
- Other compost products from various sources outside the local area, including Shelton, WA; Oregon; Alaska; and Vancouver, B.C.

[4] PREP stands for "Pierce County Recycled Earth Products." Materials from the county's yard waste collection are processed at the County-owned Purdy Compost Facility, which Land Recovery, Inc. (LRI) operates.

[5] The participants did not mention it by name, but this compost source appears to be Soos Creek Organics.

"We get some shipped in from Alaska. We get some shipped in from Vancouver, some from Oregon, some from across over in Shelton…. It depends on what we're using it for. For us, we do some specialized compost teas… so we're looking for certain microbial counts, different forest types, different types of waste that the compost is being used for."

"It's [PREP compost] all under cover…. They are windrowing it, doing the rotation thing, and doing air injection. It's the product that I work with. I don't use anything else."

"Now we bring in a lot of stuff from out of state when we need to…. We're able to ship stuff in from out of state and justify that cost."

"That stuff that we get in from Alaska is getting cheaper…. It's a waste product up there. They bury that stuff in landfills up there because they go to put up a new building in… their downtown area [which] still has 15 feet… thick of humus, pure humus, on the ground."

"The City of Vancouver itself has a composting facility, and… they're putting out 38,000 tons. And it's awesome compost that they're putting out. And this is a city facility that's doing it, and there are four or five others that are doing it. And actually we're looking at getting stuff shipped down from Vancouver because it's not that much more expensive to get the Vancouver stuff shipped down here. Especially when you figure in the exchange rate from Canada, we could get a truckload of really good quality compost out of their city landfill that beats the socks off of just about anything that's readily available in large quantities here."

- **Landscapers use compost products in a variety of applications, though compost is not often used in landscaping at typical new homes.**

Most of the focus group participants currently use compost products in turf installation and other landscaping work. The amounts of compost used vary considerably, even among the focus group participants. One participant stated that a minimum of 1 to 2 feet of topsoil is necessary in soil preparation, and he sometimes uses up to 3 feet; 24 inches is the typical amount of topsoil he uses in turf installation. Another participant said that he amends soils 8 to 10 inches deep with a tiller, and another uses 10 inches of amended soils for turf installation. As discussed elsewhere in this report, most participants believed that their soil preparation efforts significantly exceeded standard industry practices in the broader landscaping field.

Though most focus group participants use compost products, they noted that use of organics is much less common within the landscaping industry as a whole. When compost is used, participants said that most of the industry gets its

materials from two sources in region. The landscapers estimated that 60 to 80 percent of commercial compost is used in soil blends made at a soil or compost company, and more compost is made into a soil blend at the landscaping site. Some compost is used as mulch, and cedar bark is commonly used as well.

When probed about compost quantities, most of the participants did not have detailed knowledge of how much compost is used in each application, but they expressed general consensus on where more and less compost is used in landscaping. When compost is used, according to the participants, it mainly goes into landscape retrofits, landscapes accompanying high-end home construction, as well as maintenance of existing landscaping.

The landscapers expressed consensus that compost is generally not used in the landscaping that accompanies typical new home construction. They noted, however, that small amounts of compost in topsoil blends imported to new developments, but they felt that use of organic materials at these sites is insufficient and ineffective. The discussion focused on residential uses, but participants noted that some public-sector clients, such as the county and state transportation departments, specify compost in certain projects. This report's section on "Landscaping Materials: Use & Demand" provides more information on landscaping practices in new home construction and when compost is used.

Focus group participants reported that the landscaping industry employs various compost products in a range of applications, including the following uses:

- Top-dressing for turf (usually mixed with sand);
- Mulch;
- Soil mixes or blends (purchased from a supplier or made by the landscapers)
- Soil amendment (till into existing soil for lawn installation and other purposes);
- Subsurface soil amendment;
- Flower beds and other garden beds;
- Erosion control and landslide restoration (pure compost or compost-rich soil can be blown onto steep slopes); and
- Compost tea as an anti-fungal inoculant for soils or directly on plants.

Compost is often used to increase water retention in soil or to improve drainage. The specific products and landscaping practices used vary greatly according to the needs of the particular site. For example, if the existing soils contain no organic content, pure compost can be used as a soil amendment; if some organic matter is already present in the soil, a soil blend would more likely be used. Seasonal factors also affect the products and practices employed.

Participants also noted that soil improvement should be viewed as a long-term, gradual process, rather than a single step.

- **Landscapers feel that compost quality needs improvement.**

Many of the landscapers in the focus groups expressed concerns about the quality of the compost products that are currently available. Some of the compost problems they identified included the following issues:

- Materials that are not yet fully composted and are still "hot";
- Anaerobic materials with consequent odor problems;
- Excessive moisture or water content;
- Inconsistent texture, with large clumps or pieces of materials (e.g., wood chips); and
- Presence of weed seeds.

The participants noted that the word "compost" has become a useful marketing term, but many of the products currently available are not true compost. Rather, the landscapers labeled them as "decomposing mulch" or "aged mulch," instead of compost. Focus group members expressed consensus that most of the commercially available compost products have some problems, though they noted that certain products are better than others and may be better suited to different types of uses. Participants had experienced a number of problems with particular compost products.

Some of the landscapers generally liked certain compost products, but a number of the participants recounted experiences indicating that quality has dropped and that consistency can be an issue. Participants also noted that, due to its yard waste origins, some compost may have problems with weed seeds if it is not sufficiently processed. They also said that general space constraints at some facilities force them to move materials through too quickly, which does not allow sufficient time for thorough composting of wastes.

To avoid weed seeds, one participant said she would ideally use dairy compost, but its strong smell can raise objections from customers. Another discussant noted that dairy manure can also have problems with weed seeds if it is not composted sufficiently. Some participants also noted that bark mulches can be problematic, as they may bear disease.

> *"I'd say I've had a problem with almost everything, except for the compost tea."*

"The quality of the stuff, it's dropped dramatically…. It's more of a really anaerobic mulch."

"What's called compost right now, by most of the manufacturers, I won't really consider compost…. 'Decomposing mulch,' would be a better word for it…. It's in a very anaerobic state…. It has not decomposed. It's still very hot, and it can be very detrimental to the plant material if you use too much of it. And [for] some of the 'soil mixes' that are being made… the organic matter in it is so high that you will have trouble with it later on."

"They're marketing the word 'compost.' They want to put the word on all these different soil types, and… probably very few percent of them are real compost."

"The only way I find that you can make a good compost is if you do windrows."

"The surplus of green waste that comes in to these plants is so large that they need to turn it around and get it back out. And probably they have, I don't think, as large an outfit [as needed] to actually do the job right."

"I don't think there's a shortage of source. I mean, we're pouring in the grass and leaves and everything. It's just the turn-around time is too fast. It's not processed enough."

"…they have to turn it over so fast that there's lots of woody matter…. You have to be careful with things like that because anytime [there's an] anaerobic state, that also means diseases…. If you have wood material that came in from diseased trees, [diseases] will still be active within the compost, in the mulch."

"This stuff… they turn it over too fast. It doesn't really work good."

"Topsoil companies will not take that [clay soil]. I mean, they do use a percentage in their fills for three-ways. I don't care what they say, but you'll find it there."

"[There's] a certain amount of excavation from gas station gas tank soil…. We got a batch that… you could smell the [gas]!"

- **Inconsistency is a problem for some compost products.**

For some compost products, particularly those made from yard waste, landscapers in the focus groups had experienced problems with a lack of consistent composition and particle size. Seasonal variation is a significant issue, with excessive moisture content and high carbon levels posing problems in the winter.

Some facilities stockpile materials and mix them throughout the year, enabling them to produce a more consistent product. And while some said that biosolids products are highly consistent, some biosolid composts may potentially contain heavy metals, though one landscaper reported it was not a problem because microorganisms in healthy soil bind with pollutants. One participant liked the product because it is well decomposed, readily available, has small particles, few diseases, and breaks down well into soils. Landscapers said that this type of compost is high in urea, which can pollute groundwater; its sawdust content can pull nitrogen out of soils; and it may carry diseases.

"You don't know what you're getting from one batch to the next."

"I've been using… a lot, and I have had, at times, challenges with their topsoil, no question, and its ups and downs. And it's not consistent, but I haven't had any real negative issues with it."

"If you're going to talk about problems with the blends – the lawn top-dressing mix, the biggest problem I have with that is that I do a lot of bent-grass lawns, short cut, like a golf course fairway, with reel mowers. My biggest problem with top-dressing is I can't have any rocks in it; it's got to be screened sand. They have a terrible problem with getting the coarser [material] – what I call gravel – out of their mix. And so that's one of the reasons why I try not to use it if I don't have to, but if sometimes if I need two or three yards, I've got to use it. And then I just have to send my crew out for a day or two and pick rocks out."

"Sometimes it's like rock-hard clumps everywhere, and other times it's totally soaking wet…. It's not consistent enough. If you try and give someone an idea of how much a job costs, and then the product… weighs twice as much and you have to break down the clumps when you spread it as a top-dressing… it takes forever."

"But… the quality is really intermittent. And the fact that they don't separate… what comes in as woody material and what comes in as grass clippings and stuff. We get product in the wintertime that's just water-laden…. It's just sopping wet."

"It's a nightmare in the winter."

"Sometimes it's sopping wet. Sometimes the stuff is so clumped together you have to beat it with a rototiller. Or you can't break it apart – you just have to bury a big piece…. Sometimes it's got big pieces of clay in it."

"And when they're charging by the ton, a wet load's going to cost your customer twice as much as a dry [one]. And you get half as much material."

- **Landscapers believe that at times an imbalance exists between short-term supply and demand for compost products.**

Though significant demand for compost is not currently widespread in the landscaping industry, focus group participants noted that they still experience problems with obtaining sufficient supplies of compost products. Participants noted that supply problems can exist for both high- and low-volume compost needs. Large users of soil blends and other products said they cannot obtain compost on short notice and in sufficient quantities to meet their needs. On the other hand, small users noted the difficulty of obtaining orders of compost in less-than-truckload quantities, unless they pick it up from the compost facility. According to the participants, the majority of landscapers in the industry simply use whatever material is cheapest and available in sufficient volumes.

In particular, several landscapers expressed satisfaction with biosolids and manure products, but were disappointed that they could not obtain these materials in larger quantities. Participants noted that, because these companies are not taking steps to expand their operations, supplies of these materials will remain limited unless other producers enter the market.

> *"There's a shortage of good topsoil."*
>
> *"Nobody else has it available." Landscapers expressed regarding supply.*
>
> *"It's tough to get good topsoil."*
>
> *"The reason that we're sort of stuck using these other [non-compost] alternatives is because of a certain amount of quantity that you need to produce for your clients' needs."*
>
> *"The real estate being as expensive as it is around here, you might have to go east of the mountains or to Oregon to get the [composting] job done because who can tie up that much land to take care of the volume that you need?"*
>
> *"It was a lot easier to get orders from…[Outside King County]…so I switched because they were faster and cheaper."*
>
> *"There's not a lot of options [in terms of better sources of compost]."*
>
> *"I call him up and say, 'Hey, when's the next blower truck available?' 'Whoa....' I said, 'So, tomorrow's out of the question, huh?' …So I said, 'See you later. I'm going to look for somebody else.'"*
>
> *"You can't get the material. For [some] you need to book those up in advance. With us, we go down and pick up the material ourselves and bring it to our sites. We don't rely on them."*

"Sometimes there's just no budget and there's no time for the soil prep, the quality of materials because… you can't get…stuff in a heartbeat, unless you go pick it up."

Landscaping Materials: Use & Demand

The focus groups explored economic issues associated with organic materials and alternative products. Participants discussed what alternative materials – such as peat moss, fertilizers, and other soil amendments – are used in place of compost products in landscaping. The discussion covered the extent to which price drives purchasing decisions as well as how increasing the use of organics would change costs in comparison with current landscaping practices. In addition, participants also addressed other factors that drive decisions on the use of organics or alternate materials, such as whether most landscapers have control over the issue or whether clients and contracts typically specify the use of particular materials.

The first finding in this section of the report addresses the broad issue that higher costs often preclude compost use. The remaining findings focus on specific facets of the cost topic, including lifecycle costs and benefits, alternative products, specifications, new housing developments, high-end homes, and landscaping retrofits.

- **Initial costs favor the use of non-compost products. The short-term marginal costs of landscaping with compost are higher, but compost use can pay for itself over time.**

Though the focus group participants supported compost use, they agreed that compost products are generally more expensive than their non-organic counterparts. In the landscaping industry as whole, this higher cost frequently presents a barrier to increased use of compost. The participants explained that non-organic alternatives are typically less expensive and more readily available than compost.

"We have to have our costs in mind to be competitive with other contractors. There's a lot of different ways that it can be done, but… what we're looking at also is the dollar at the bottom line: A) are we going to get the contract? Or B), are we going to do it actually the right way, but be so out of the ballpark as far as bidding the work that we're going to be out of business?"

"The breaking point is… cost – what they think is cost…. One of the main problems I see is short-sightedness.... That is where the change has to happen: quality is not quantity."

The focus group participants agreed that using compost and installing a high-quality landscape is significantly more expensive than standard industry practices. However, they described a range of cost estimates. Participants said that average homeowners may spend 3 to 4 percent of the house cost on landscaping, while developers typically spend in the range of 1 to 3 percent. In contrast, the participants reported that doing landscaping "right" – including appropriate compost use, as well as irrigation, drainage, plants, and other landscaping – could cost from twice as much as conventional practices up to 10 to 25 percent of the total house price.

> *"It's 10 to 15 percent of the total house value.... That's usually what I tell people, that if you're going to do a landscape right, it's got to be 10 to 15 percent."*
>
> *"Realistically, when you add up irrigation systems, doing the soils properly, selecting the right plant material. You're right, it's going to end being about 10 to 15 percent… of the house price is what it's going to take to do a proper landscape."*
>
> *"10 to 15 [percent]. Sometimes up to 20, 25 [percent]."*
>
> *"It's probably twice as expensive to get good stuff."*
>
> *"To do it right, it's probably twice the cost."*

The participants agreed, however, that the benefits of compost use are significant. Though the initial installation costs more, it pays off in reduced water bills and fertilizer costs over the longer term. A first-rate landscaping job can also increase the quality and amount of usable outdoor space and enhance the value of the house. Tangible benefits – such as lower water bills as well as healthier, more attractive lawns and landscaping – can be a strong advertisement for compost use.

> *"I could save the City of Seattle 50 percent of their water bill overnight."*
>
> *"Well, the thing is… they'll [homeowners] get that money [spent on compost] back."*
>
> *"We've researched on our clients over the years, and they've recouped just in water cost alone. And they've reduced their water cost by half, and just in that they're usually recouping the cost of all that additional soil prep within the first 5 to 7 years of the project. And if they're in that home 20 years, they're going to be actually making money."*
>
> *"I'll take her [the customer] up to one of our job sites – she can see the difference."*

- **Alternatives to compost are more readily available and less expensive, but focus group participants see them as inferior.**

Most focus group participants expressed a preference for using compost and other organic landscaping products, though some landscapers explained that project budgets did not always enable them to use organics. The participants noted that the landscaping industry as a whole often uses a variety of products and materials in place of compost products. According to the focus groups, the landscaping industry uses various alternatives to compost products including the following materials and practices:

- Chemical fertilizers;
- Sand;
- Clay (which is generally not considered desirable to use, but disposing of it is difficult and costly, so it is sometimes mixed into soils);
- Type A and C soil mixes (topsoil);
- Peat moss;[6]
- Sawdust;
- Cedar bark; and
- Doing nothing.

According to the focus groups, other landscapers often use these products because most of them are available more readily, in larger quantities, and at lower cost than compost. Participants also believed that the chemical industry that produces fertilizers, pesticides, and other lawn products fosters their use and impedes increased use of compost.

The focus group members noted that landscapers and homeowners commonly use these non-compost products. Some of the participants also acknowledged that they used these materials themselves, at least at times. They did not necessarily support or encourage their use, however, but they felt that they had little choice in using them to keep their costs down to obtain work.

Many participants expressed concerns about the adverse environmental impacts of non-compost products and practices, particularly the use of chemical

[6] Though peat moss derives from organic origins, for the purposes of this study, we do not include it as a target organic product. Its production is environmentally destructive, and it is essentially a non-renewable resource, except over an extended time horizon.

pesticides and fertilizers. They generally considered these products to be inferior to organic, compost-based landscaping.

> *"Most people will use – at this point in time to keep the stuff growing – chemical fertilizers."*
>
> *"When you fertilize them [plants] with chemical fertilizers, all you're doing, you're making them junkies. They're addicted junkies. If you don't give them your fix, they crash. Then all the diseases move in… you nuke the place. It's a vicious cycle."*
>
> *"If you don't have the right mix, you need the [chemical] fix."*
>
> *"It's the same thing with… the overuse of chemicals. Most of that, I feel, is done by homeowners, not by the landscapers…. So why don't they just eliminate the chemical section at [local stores]?"*
>
> *"I don't think it's the landscaper that's the problem. I think it's the homeowner that's the problem, as far as using chemicals. The homeowner doesn't have any understanding of what it's going to do."*
>
> *"The problem is that it's killing the microorganisms."*
>
> *"It's [yard chemicals] called contaminated waste."*
>
> *"I won't use peat. It's terrible stuff to work with and anhydrous and everything else…if you saw what they're doing to the wetlands in Canada harvesting…. I can't support that."*

- **Job specs and short-term considerations drive decisions about landscaping materials and practices.**

Project budgets and specifications often leave landscapers with little flexibility on the choice of whether to use compost. For public projects and private residential and commercial developments, landscape architects and engineers typically determine the specifications for landscaping installations. Specifications can cover both products and uses, including such issues as soil aeration, drainage, and nutrients. The participants noted that the designers of specifications may lack a thorough knowledge of soils and plant materials. Though projects do not typically specify certain types of topsoil or restrict compost use, cost constraints often preclude the use of compost unless it is explicitly specified in the contract.

Homeowners make decisions about their own landscaping projects, but focus group participants noted that these individuals often do not understand their soils or the benefits of increased compost use. Homeowners may be amenable to paying more to incorporate compost, however, if they understand the benefits it brings as well as potential future cost savings. The participants also noted that

site constraints, such as access to backyards, can make it difficult to incorporate sufficient amounts of compost in some cases. The participants agreed that most developers are primarily concerned with short-term costs and aesthetics. As a result, compost is rarely used in new subdivisions, as discussed further in the next finding.

> *"People say… 'I want a new lawn put in,' but there's no specifications. So I bid it the way I think it should be done, and I'm a mile above everybody else. And they come, and they throw a little dirt on top, and they throw sod on it…. And people say 'Man, we saved money!'"*
>
> *"We have certain builders that we work for, and it's always just the budget. Get the budget, approve the design, and do it."*
>
> *"A lot of the time it's derived from a landscape budget."*
>
> *"I would use more [compost] if it was specified."*
>
> *"You have to communicate the difference in quality… to the clients, so they understand what they're paying for and what they're getting. [Then] they go for the value."*
>
> *"You probably lose five jobs [because of higher cost], but you do one job that's real good quality – that guy is going to tell everybody about you."*

- **New housing developments typically take a least-cost approach, where cost and availability drive the choice of landscaping products and practices. High-end or custom homes and retrofits are more likely to use compost initially.**

According to the focus group participants, landscaping practices in new housing developments are usually minimal. Typical developments have little topsoil and poor drainage. Builders seek to minimize their landscaping costs, and compost is rarely used. The focus group participants said that builders and contractors sometimes install the landscaping themselves, rather than hiring landscape professionals.

According to the landscapers, new developments use little, if any, topsoil, and the new soil is not incorporated into existing soils. Participants estimated that imported topsoil ranges from 0 to 4 inches in depth, and they said that sod (often clay-based) is usually placed on top of sandy soil. To compensate for the shortcomings of this approach, chemicals are used to help lawns grow. Most builders provide landscaping in the front yard only.

The participants noted that the possibility exists for offering more landscaping options if the home buyer is involved earlier in the process (as with interior decorating choices), but they said that this situation does not typically occur.

Some landscapers felt that as homeowners have more money, they may be willing to pay more for better landscaping work.

> *"The developments that are put in by a developer and sold on the real estate market cut every corner there is."*
>
> *"That's our issue. We're lucky we got the [soil] prep that we do. And we know we're not even doing that right. But that's the best we can come up with the money they're [builders] willing to spend."*
>
> *"It's just to sell the house. The builder doesn't care if it [landscaping] dies."*
>
> *"Right now, in most new construction, you have contractors putting in landscapes."*
>
> *"Bad idea!"*
>
> *"I've been on new construction jobs where they've got this packed-down, rocky, poor soil… and they've got room enough on the foundation… to put 2 or 3 inches of soil down and that's what they expect…. And I was surprised they even came to me – I don't know why they didn't just do it themselves…. Generally, that's what's being done."*
>
> *"[Home-building] Contractors are doing it [landscaping] themselves. And they're bringing in a couple of inches of dirt of some kind… and throwing sod on it."*
>
> *"All of my accounts… are residential… and… up in the hills… new developments [with] real nice, beautiful homes. And… they came [with heavy machinery] and skimmed everything [topsoil] off and they just, virtually, laid sod down on top of this soil. And that's a real problem to maintain."*
>
> *"We end up maintaining this junk that's put in. And the newer the project, the worse it is. You cannot keep a lawn green for more than 3 weeks. And the shrubs die."*
>
> *"They'll just lay a little bit of dirt or compost or soil mix on top of what's there. They don't incorporate it. They lay sod on it. They put… some good chemical fertilizer and, boy, it turns green quick."*
>
> *"It looks real pretty 'til it sells."*
>
> *"3 or 4 inches of soil – that won't do. That just doesn't work. If you had that in nature, you would not be growing conifers."*

"They [homeowners] learn their lesson in the front yard. Then they hire one of us to do their backyard…. Builders only usually provide the front yard."

"I've seen a few developers. They'll take a forested area, and they'll clear it. And they'll scrape up all the native topsoil, and you'd think that would… be great to put back. But what they end up doing is you might see a 'Free Topsoil' sign out front. Well, they can get that hauled off for free."

"Contractors get around a lot of that crap [permits for importing soil] by literally bringing in 3 inches of soil, 10 yards to do an 8000-square-foot lot… [They] throw a little beauty bark and walk away. Because, again, what's left on the budget for landscape? [They say] 'Well, we've got two grand. Can you throw it in for two grand?' 'Well, hey, Johnny over here is looking for work….'"

"Silt-based sod, that's another big problem…. We will hydroseed everywhere before we will put down sod. Because the sod farms right now… years ago, they stripped all their topsoil off the sod farms, and they're growing [sod] on clay…. They put their seed down. They nuke it with as much fertilizer as they possibly can to get it to grow in the clay, and they scrape off [the sod]. I mean it seals up. We had one where we had to do a little bit of sod and the stuff ended up like… it was unbelievable – it had actually sealed the ground where water was actually running off the lawn and into the beds, just about the same as if we would've put a concrete driveway in."

"They [builders] want to see more plants [rather] than what's in the soil."

"They [builders] don't care if they [plants] die in 5 years."

Though large-scale compost use remains relatively uncommon in the landscaping industry as a whole, its use is more frequent in custom homes, high-end residential developments, and landscaping retrofits. Even in these categories, compost use is not necessarily a standard practice, but it is more prevalent.

With some exceptions, most focus group participants are full-service landscaping companies, rather than "mow/blow" businesses. They do the majority of their work for high-end residential customers, with house costs beginning at $350,000 to $500,000 up to more than $1 million. Their customers are generally willing to pay higher prices for better quality landscaping products and practices.

More expensive homes, however, do not always translate to higher-quality landscaping and soil preparation. Some participants noted that owners of $500,000 houses may be especially frugal with their money because they have leveraged everything to buy their homes. One landscaper explained that "a new million-dollar house" is just "a $300,000 house with a fancy bathtub" and that

landscaping may not necessarily be of better quality, unless the owner specifically pursues it.

Retrofits usually involve higher-quality work because the landscaping was often done wrong initially, and now homeowners are willing to pay more to fix the problems. Since homeowners are making the effort to conduct the retrofit, they are usually willing to invest enough to do the job properly. Focus group participants said that about half of retrofits are performed to at least a minimal higher standard of landscaping quality. Homeowners hiring landscapers to conduct such projects are highly concerned about finding the right company to do the work, and they invest significant time in their search, including interviewing candidates and reviewing work samples.

> *"In terms of my turf consultation calls, probably 90 percent of the work I generate is due to improper installation in the first place. 90 percent of the work, I have to come in and fix what wasn't done right in the first place."*
>
> *"If you go to any of the new home construction spots – any of these giant developments, the entire development – I can just go in and say, 'Yeah, you'll be calling me.'"*
>
> *"5 to 8 percent maximum [of the population is landscaping the 'right' way]."*
>
> *"You find a much higher quality in a retrofit than you will in any kind of developer's work."*
>
> *"Because the original [landscaping] has usually failed."*
>
> *"They're [homeowners are] willing to pay the extra money to make sure it doesn't fail a second time."*

Market Potential: Barriers & Opportunities

The focus group participants explored issues that prevent landscapers from using more compost. The group also considered incentives or other changes, such as improved quality control or certification, which could encourage landscapers to increase their use of compost products. In addition, they discussed their expectations about future demand for organic-based products. The participants suggested ideas for addressing the identified barriers to compost use, including opportunities to improve product quality. The landscapers also considered possible initiatives from the public and private sectors, including potential regulations and compost company measures, which could help increase compost use.

- **Landscapers expect demand for compost products to grow in the future.**

Participants in both focus groups were unanimous in their expectation that compost use will increase in the future. They expected that increased awareness, public policies, higher quality, as well as new and improved products would combine to foster more use of compost in King County. To facilitate this future growth, landscapers noted that improvements in the quality and supply of compost products are needed.

> *"From my experience… we've seen an increase in the usage and awareness of just the concept and the word 'compost.'"*
>
> *"[The future is] very exciting…. Well, people have to learn a little more with compost."*
>
> *"I would say 20 [percent of homeowners have the money to spend on high-quality landscaping] – 20 and growing."*
>
> *"You can make changes…. Everybody will become more and more aware. I remember, recycling – I lived on Capitol Hill [that supermarket lot]… was the only place in Seattle you could recycle. And there was about seven of us, and I knew everybody in Seattle who was recycling…. Now they're coming to pick it up at your house. See the steps that have changed? Same will happen with this [compost]."*
>
> *"Surprise, surprise – the City of Seattle has bought five compost tea sprayers."*
>
> *"There is definitely a large increase in the clientele's knowledge of what it is that makes up a landscape, what it is that they want. I find people have more and more locked-in ideas about being willing to spend that kind of money because they understand what the benefits and the repercussions are from doing the job properly – understanding the quality of what a good landscape is and what the benefits [are] that they're going to derive from having a well-installed landscape."*
>
> *"I think for the most part, the science is there today. It's forcing people to go by it. This salmon problem is probably going to be the first thing that really brings about the public's involvement and participation in this experiment…. It's also going to affect the laws on herbicides, pesticides in general, and with any luck, regulations on specifications in landscaping."*

- **Landscapers are willing to pay more for a consistent and high-quality product.**

The participants in the focus groups are enthusiastic supporters of compost use, and they want to see more products and higher-quality materials available. For them, quality assurance is key. In particular, they noted a need for standards, written by practitioners. For example, landscapers could form an advisory group to the County. Standards should cover such issues as minimizing the amount of material other than compost (e.g., pieces of plastic), ensuring appropriate moisture content, and maintaining a predictable level of nutrients and consistent compost content.

Good compost needs to be fully decomposed (with no bad smell), have low moisture content, and be consistent in composition. Many landscapers asserted that windrows are the best way to produce high-quality, thoroughly decomposed compost. The participants expressed interest in "gourmet" compost products, including turf mix, conifer mix, deciduous mix, and other specialized composts. One landscaper wanted allelopathic compost made from conifers, which could be used to suppress seed germination. The landscapers are also interested in having a wider variety of compost products available for use.

The focus group participants said they would be willing to pay more for high-quality compost, but they do not necessarily represent the industry as a whole. Since the high costs of applying compost are already a barrier to its use in standard landscaping practices, higher prices would likely hinder efforts to increase compost use throughout the industry. Participants agreed, however, that the landscaping industry would use more compost if better products were available.

> *"If somebody came out with what we call a 'gourmet compost,' it'd sell great."*
>
> *"I use it pretty regularly… and I'm just a small company, but, yeah, I'd use more of it. I would like a 'perfect mix'… with compost included in it… and some natural soils and some sand."*
>
> *"I don't know if I'd use any more, but I might be willing pay more for a better product."*
>
> *"I'd use more. And I'd be happy to sell anything because I do have a garden center. And that's the thing is, good products – there's never enough good products."*

- **Education of consumers, developers, and landscapers on the benefits of compost is key to future demand.**

Education is essential to increasing the use of compost. The focus group participants agreed that landscapers need to explain to their customers why using organic materials is more expensive and the benefits that are gained for these increased costs. Lessons and instruction on appropriate use of compost should be provided through schools, government agencies, garden clubs, as well as groups such as the Washington Association of Landscape Professionals, the Washington State Nursery and Landscape Association, and other professional organizations. The participants also suggested that garden columnists and radio personalities, such as Ed Hume and others, could help educate people about the benefits of compost.

When it comes to using compost and other organic materials, most participants in the focus groups are "members of the choir" – that is, they are already believers in the benefits of compost, and most are advocates of its use. Focus group participants agreed, however, that a majority of other landscapers in the region use little or no compost. These other landscapers should be a key target of educational and promotional efforts, for they represent a large group of potential users.

Smaller, unlicensed individuals and companies that mostly mow lawns and do small landscaping jobs represent another sector of the industry that needs attention to encourage compost use. The focus group participants say that they do not compete with these companies because they are not interested in seeking these types of small jobs, nor do the participants consider these firms to be true "landscapers."

> *"Lessons. Education. Education has to change on numerous different levels: in our schools, in our political systems, contracting…."*
>
> *"Educate [customers] as to what they're going to save by doing it right."*
>
> *"I think most residential customers don't really understand the reasons for its [compost's] benefits and that they like the looks of a surface treatment, but it's mainly painting the garden area dark brown…. They don't really understand what purpose it serves."*
>
> *"I think more and more people are becoming aware of what's going on in their landscape and in the environment…. People want to know what's in their soil, what we're bringing in."*
>
> *"The combination of all that knowledge… you can express to your clients or any place you go will make them change because they will understand this. This is clear English – this is not some scientific jargon."*

"[People say] 'Wow, I have something in my mind [salmon] that I can help save. How can I do it?' Well, it correlates directly to compost."

"You can educate your clients. All the builder has to do is educate their future homeowner."

"It's all a matter of education – how it looks, how it feels."

"We manage to educate the client, that's a big part of the company…. You educate the client as to what they're going to save in the long run by doing it right."

- **Sharing information and technology could improve compost products and increase their use.**

The focus group participants noted that the compost industry currently faces challenges, but sharing of technology and information could help address some of these problems. Better communication among compost producers and users could help improve compost products and ensure that they are applied properly. Landscapers and other compost users can provide valuable feedback to enable producers to improve their materials and develop products that are better suited to the needs of today's landscapers and other customers. In turn, compost producers could also educate users about their products and appropriate uses. Closer supply-chain relationships could benefit both the buyers and sellers of compost products.

Similarly, landscapers can also learn from each other regarding the use of compost and its benefits. The focus groups themselves demonstrated that participants have a high degree of interest in learning more about compost products and practices. The participants showed interest in having a continuing dialogue and exchange of information. They agreed that professional associations, such as the Washington Association of Landscape Professionals and the Washington State Nursery and Landscape Association, play an important role in sharing knowledge among practitioners. The participants reported, however, that many members of the broader landscaping industry neither participate in such groups nor actively seek such educational opportunities. Accordingly, informational outreach should make concerted efforts to target these other landscapers.

Public agencies also have an important role to play in providing information as well as facilitating information exchange within the compost and landscaping industries. The focus group discussions suggested that some landscapers could benefit from more information on regional facilities roles in yard-waste composting as well as on current efforts underway at the state level to develop standards for compost and other organic materials. The public sector could help initiate a dialogue among compost producers and users. Some focus group participants shared a misperception that King County runs a compost facility near its landfill.

> *"I think it would be really helpful if the compost producers started addressing issues like materials other than compost. I'm getting really tired of picking the little scraps of plastic out of my compost. Moisture content…. the quality issues of good product, wider variety of products available."*
>
> *"[Start] Some experimental plots out at the facilities where they're producing this, in concert with actual practitioners… and show them [compost producers] what happens. Plant some stuff."*
>
> *"I just am not happy with King County's facility [referring to the privately owned and operated facility near its landfill]. They don't do a good enough job, and there's a variety of reasons for that. Their product isn't something I could sell my customers and feel good about."*
>
> *"We just have them mix stuff special because we haven't been happy with any of the products that they've put out the door. So we've just been using basically a 50 percent basis of washed sand and a 50 percent mix of their [mulch] and using that as our base material and amending to that again depending on what the site needs."*

- **The compost industry needs competition and standards to raise quality.**

The participants noted that increasing competition within the compost industry could drive improvements in the products and foster a greater variety of landscaping materials. Setting standards for compost products would also improve their quality, and participants felt that competition could help set these standards. Landscapers and other compost customers can help motivate the industry to adopt these changes. The participants suggested that competition from sources outside King County could also create incentives for local facilities to improve their compost products.

> *"Industry standards? It's pathetic – totally pathetic."*
>
> *"There are no standards."*
>
> *"I think a standard needs to be out there, but who is writing the standards I think has to be the largest question."*
>
> *"If you're starting to ask people about who should write the standards, you can't leave them over to the people who have gone to school for the last 15 years and gotten all their degrees because they're still in the Dark Ages as far as I'm concerned. What you need to do is go to the spearheading people… the practitioners… who have actually made it work."*
>
> *"Coming up with who should write the standards, I guess one place to start is to make the producers appreciate what it is they're doing to everybody who's using this stuff – like about the problem of weeds, with plastic fragments, with horsetails."*
>
> *"I think one of the criteria would have to be for a 'gourmet' compost is a guaranteed analysis threshold, and a guarantee that you're not going to have spores or horsetail. You're not going to have weed seeds, for example. And this whole thing of letting it cook long enough and… keeping it turned and so forth is key to it."*

- **Reactions to regulatory approaches were mixed, but support exists for government involvement to encourage compost use through education and pilot projects.**

The focus group participants presented a variety of ideas on ways to increase the use of compost throughout the landscaping industry and in new developments in particular. Regulations are one potential method for increasing compost use in new construction and elsewhere, and some participants indicated support for new legal requirements on compost-amended soils. Other participants had reservations about a regulatory approach, however, and they supported different

forms of public involvement. In particular, they expressed concern that a lack of flexibility in regulations would make it difficult to address variations in different sites.

> *"I believe that there should be a code that contractors have to follow to allow for the landscape. And it will affect the water quality, the health of soils… the plant material that goes on it. You'll decrease the use of fertilizers, pesticides…and up the use of compost."*
>
> *"It's not going to change anything with water quality around here until that [law] changes. If we have building codes for every other conceived public safety concern, why don't we have building codes for landscape installations?"*
>
> *"If we took the science experiments out of the hands of the general public in the backyards, and required that professionals apply it, then their lawns would all die, and they'd be looking for some other answer."*
>
> *"So the cities are actually starting to step in and say, 'We're going to force the developers to start doing something different.'"*

In the focus groups, landscapers said that government agencies could help support compost use in ways besides regulations, such as through educational efforts and compost demonstration projects. The participants expressed support for a range of public efforts to educate residents, landscapers, and developers.

Showing results is a powerful way to educate potential users and promote compost use. Successful gardens and lawns landscaped with compost could clearly demonstrate the benefits of compost. The focus group participants also noted that existing compost facilities in the region are not necessarily the best models of how composting should be done. Accordingly, participants suggested that creating a model facility could not only produce better compost but also build support for increased composting of materials and use of compost. (They noted, however, that it might be necessary to look outside the central Puget Sound region to find sufficient space for building such a facility.) In particular, several landscapers also called on King County to improve on its compost facility, though as noted above the discussion implied that they believe the County has direct control over the facility's operations, when in fact the facility near its landfill is privately owned and operated.

> *"If you want a more conscious society, you better start teaching… landscapers and homeowners alike what compost really does for people…. There ought to be some classes on that on a more wide-range basis, free."*

- **Marketing the use of compost products could be based on such concepts as:**

  - The ability to keep your lawn green and save water;
  - The ability to keep your lawn green and save salmon;
  - The genuine, real, earthy nature of compost products;
  - You don't need chemicals and neither do the salmon;
  - The value of using compost and investing in the long term; and
  - Compost works – it produces healthier, more attractive landscapes with lower maintenance needs and costs.

Focus group participants supported compost use, and based on their comments, various ideas for marketing compost products emerged. Many landscapers in the focus groups are experienced in selling their customers on compost use, and a number of common themes emerged from the discussions. Participants noted that environmental issues resonate well with residents of this region. In addition to touting the environmental benefits, promoting the benefits to homeowners – such as reduced maintenance needs and costs, coupled with improved landscape appearance – can further encourage compost use. Such messages can serve as useful tools for educating the public on compost's benefits both to the environment and to individuals.

> *"You have to communicate the difference in quality… to the clients, so they understand what they're paying for and what they're getting. [Then] they go for the value."*
>
> *"Results.... If you have gardens that are just flourishing. You have less diseases in your gardens, and you're not using any pesticides."*
>
> *"We can show reductions in fertilizer use, water use."*
>
> *"It's selling a concept. It's not just pulling wool over your eyes. It's selling an environment. It's selling a way of life. It's selling a philosophy."*

Appendices

Appendix A – Landscaper Focus Group Discussion Guide

Appendix B – Landscaper Focus Group Participants

Appendix C – Recruitment Screener for Compost Discussion with Landscapers

Landscaper Focus Group Discussion Guide

King County Organic Materials Management Feasibility Study

I. Introduction & Background

Proposed time: 20 minutes (7:00-7:20)

A. Introduction & Purpose

1. Introduction of moderators
2. Research objectives
3. Discussion rules: candid, honest, no right or wrong answers; based on perceptions of landscaping industry as a whole; limited time
4. Participants chosen to represent a range of company types and sizes
5. Recording of proceedings

B. Introduction of Participants

1. How did you get into the landscaping business?
2. Type of work your company performs

II. Current Practices: Products & Applications

Proposed time: 30 minutes (7:20-7:50)

A. What "compost products" does the industry currently use? *List products in left column on large matrix on wall (see attached Sample Matrix 1).*

B. How do landscapers typically use these compost products? (e.g., turf, beds, etc.) *Identify different applications in top row of large matrix on wall.*

C. Which compost products are used in which applications? *Use checkmarks in matrix to identify uses of each product. If appropriate, probe to estimate approximate amounts of compost products used in various applications (orders of magnitude).*

D. Next, let's consider where these types of uses occur – that is, whether they are conducted mainly when new houses are built where no yard or landscaping exists, in replacing or re-doing existing landscaping, or in

maintaining existing landscaping. *Discuss compost uses by development types listed on flipchart. Discuss current industry practices for landscaping in new developments (e.g., do nothing, topsoil only, compost on top, compost tilled in). Probe for differences regarding front/back yards, large-scale or smaller developments, housing prices, etc. Probe to estimate where most of each application occurs by development type (orders of magnitude).*

E. Why do you use (or not use) these compost products?

F. Who typically makes the decisions about what materials to use in landscaping projects (including whether to use compost products)? *Probe regarding contractors, developers, landscape architects, homeowners, etc., and probe for differences according to type of development.*

G. What are your sources of compost products? *Probe to determine whether landscapers make their own compost products or obtain them from local or regional producers, larger or smaller suppliers, etc. List sources on flipchart.*

H. What has been your experience regarding the quality of the compost products that are currently available? *Probe to differentiate among various products and applications as well as between personal experience and word-of-mouth.*

III. Competition & Trade-offs

Proposed time: 30 minutes (7:50-8:20)

A. What materials do landscapers typically use when not using compost products? *List alternative products on flipchart.*

Why are these products used instead of compost products? What is the relative frequency of their use?

B. What are the advantages and disadvantages of each set of comparable products (by application)? *Probe for the following issues:*

1. Quality
2. Price/cost
3. Availability
4. Ease of use (both labor and equipment)
5. Specifications in contracts, by owners, etc.

IV. Barriers & Opportunities

Proposed time: 30 minutes (8:20-8:50)

A. Do you think the landscaping industry as a whole could use more compost products? If so, which products and in which applications? Why or why not?

B. What would motivate landscapers to use more compost products? *Probe for price considerations.*

C. What changes in supply and demand of compost products do you expect in the future? What's driving these changes?

D. Are there any actions that a local public or private entity could take to increase the use of compost products in the region? *Probe for reactions to specific regulatory proposals provided by King County, including the ability to incorporate different amounts of compost (2", 4", or 6") at different depths (6", 8" or more). Probe for information on capital costs of purchasing new equipment to till compost into soil at greater depths.*

E. How do you think members of the landscaping industry could help increase the use of compost products?

V. Conclusion

Proposed time: 10 minutes (8:50-9:00)

The moderator will wrap up the discussion and explain its purpose, including a brief description of the organic materials management project, its major goals, and the client. He will also mention the follow-up survey. Time will be available for any follow-up questions or comments from focus group participants.

Use of Compost Products in Landscaping

by Product Type and Application

Sample Matrix 1

COMPOST PRODUCTS	LANDSCAPING APPLICATIONS			
	Turf		*Beds*	*Other Landscaping*
	Tilled compost	*Compost on top*		
Yard waste compost	✓	✓	✓	✓
Other compost	✓			✓
Blends	✓	✓	✓	
Mulch			✓	✓
Green mulch			✓	
Compost tea		✓	✓	
etc.	✓			✓

Blue *Filled in with responses from focus group participants*

Black Pre-printed on matrix

Appendix B: Landscaper Focus Group Participants

Focus Group Session I

Tuesday, June 27, 2000, 7:00-9:00 p.m.

Loretta Aschenbrenner
Custom Craft Landscape

Steven Aschenbrenner
Custom Craft Landscape

Neil Buchanan
Headfirst Construction Company

Jason Curry
Curry Lawn & Garden, Inc.

David Drottz
Terraco, Inc.

Brett Gile
In Harmony, Inc.

Doug Hart
Lake East Grounds Maintenance

Hendrikus Schraven
Hendrikus Schraven Landscape Construction & Design, Inc.

Dave Smith
Supreme Landscape Services

Michael Swassing
A Natural Gardener

Focus Group Session II

Wednesday, June 28, 2000, 7:00-9:00 p.m.

Sarah Bishop
Exteriorscapes, LLC

Joe Bittler
Sundance Landscaping

Kevin Campbell
Sunburst Landscape

Eric Chapman
Full Maintenance Gardening

Corry Ehlars
E & J Natural Creations

Karl Feret
Hendrikus Schraven Landscape Construction & Design, Inc.

Bob Hoyle
Bob's Lawn & Garden Service

Scott McAusland
Eden Lawn & Garden, Inc.

Libby Nichols
Libby's Lawn & Garden, Inc.

Monte Russell
Rich Landscape

Jim Winterbourne
Tutko Landscaping & Nursery, Inc.

Recruitment Screener for Compost Discussion with Landscapers

Company _____
Address _____ **City** _____
Phone _____ **Zip** _____
Recruiter _____ **Date** _____
Confirmation letter sent _____ **Confirmed** _____
Comments _____

Hi, my name is _____ from Cascadia Consulting, an independent research firm in Seattle. We're inviting landscapers in King County to discuss supply and demand for organic materials, such as compost. Because we value your input and time, we are offering a $100 cash honorarium for company managers to participate in a two-hour discussion on the evening of June 27th or 28th. The discussion groups are held for research purposes only, and no attempt will be made to sell you any type of products or services. The group will be relaxed and informal, and you will simply be involved in an exchange of ideas and opinions.

1. We need to hold this discussion with people who are in charge of decisions about purchasing and using various landscape materials, such as business owners, managers, or crew leaders. Would that be you?

Yes	Continue
No	Ask to speak with a person who makes these decisions (repeat introduction to new person). If not available, find out contact name and a time to call back.

2. The next few questions are for classification purposes only, so that we can have a balanced discussion group. Where does your company perform most of its work?

Seattle	Thank & terminate
Eastside	Continue
Other King County outside Seattle	Continue
Outside King County	Thank & terminate

3. What type of work is your company's main focus?

Maintenance of existing landscaping	Recruit a roughly even mix, if possible
Installation of new landscaping in developments	

4. Could you please let me know into which of following categories the annual revenues for your company fall?

Less than $500,000 (small)

$500,000 to $1 million (medium)

$1 million to $2.5 million (large)

More than $2.5 million (very large)

Recruit about half small & half medium/large/very large

5. Does your company use any compost products, such as leaf and yard-waste compost, manure, food waste, or green mulch?

Yes.....Continue

No .....Skip to Question 7

6. To what extent does your company use these organic materials in its work, including turf application and individual plantings?

Always / Often

Sometimes / Occasionally

Rarely / Never

Recruit a roughly even mix of the first two categories; include no more than 2 "rarely/never"

7. Because only a limited number of landscapers can be invited to participate, it is very important that we can count on you to attend. Will you be available on the evening of Tuesday, June 27, or Wednesday, June 28, from 7:00 to 9:00 p.m.?

Yes.....Ask which date is preferred

No .....Thank & terminate

The discussion will be held at the Bellevue Botanical Garden, off I-405 near downtown Bellevue. May I please have your contact information, so that I can mail or fax you a confirmation letter and a map to the meeting location?

Name _____ Company _____

Mailing Address _____

Phone _____ Fax _____ Cellphone _____

Focus group date/time.....Tues., June 27, 7:00-9:00 p.m.

(confirm with respondent & circle one).....Wed., June 28, 7:00-9:00 p.m.

Thank you very much for your time. We look forward to seeing you on June 27/28.